



STATE OF TENNESSEE  
TREASURY

**REQUEST FOR PROPOSALS # 30901-44320  
AMENDMENT # 3  
FOR ACTUARIAL AUDIT OF THE JUNE 30, 2019  
TCRS ACTUARIAL VALUATION**

**DATE: April 7, 2020**

**RFP # 30901-44320 IS AMENDED AS FOLLOWS:**

1. This RFP Schedule of Events updates and confirms scheduled RFP dates. Any event, time, or date containing revised or new text is highlighted.

EVENT	TIME (central time zone)	DATE	UPDATED OR CONFIRMED
1. RFP Issued		February 13, 2020	CONFIRMED
2. Disability Accommodation Request Deadline	2:00 p.m.	February 19, 2020	CONFIRMED
3. Pre-response Teleconference	10:00 a.m.	February 20, 2020	CONFIRMED
4. Notice of Intent to Respond Deadline	2:00 p.m.	February 21, 2020	CONFIRMED
5. Written "Questions & Comments" Deadline	2:00 p.m.	February 28, 2020	CONFIRMED
6. State Response to Written "Questions & Comments"		March 10, 2020	CONFIRMED
7. Response Deadline	2:00 p.m.	April 14, 2020	CONFIRMED
8. State Completion of Technical Response Evaluations		April 23, 2020	CONFIRMED
9. State Opening & Scoring of Cost Proposals		April 24, 2020	CONFIRMED
10. State Notice of Intent to Award Released <u>and</u> RFP Files Opened for Public Inspection		April 29, 2020	CONFIRMED
11. End of Open File Period		May 6, 2020	CONFIRMED
12. State sends contract to Contractor for signature		May 7, 2020	CONFIRMED
13. Contractor Signature Deadline	2:00 p.m.	May 14, 2020	CONFIRMED

2. Delete RFP section 1.4.5 in its entirety and insert the following in its place (any sentence or paragraph containing revised or new text is highlighted):

1.4.5. Respondents must assume the risk of the method of dispatching any communication or response to the State. The State assumes no responsibility for delays or delivery failures resulting from the Respondent's method of dispatch. It is encouraged for suppliers to submit bids digitally. Actual or digital "postmarking" of a communication or response to the State by a specified deadline is not a substitute for the State's actual receipt of a communication or response.

3. Delete RFP section 3.1.2.4 in its entirety and insert the following in its place (any sentence or paragraph containing revised or new text is highlighted):

3.1.2.4. A Respondent must submit the Cost Proposal to the State on a separate e-mail or CD or USB flash drive from the Technical Response (as detailed in RFP Sections 3.2.3., et. seq).

4. Delete RFP section 3.2.2. in its entirety and insert the following in its place (any sentence or paragraph containing revised or new text is highlighted):

3.2.2. A Respondent must submit their response as specified in one of the two formats below.

**3.2.2.1. Digital Media Submission**

**3.2.2.1.1 Technical Response**

The Technical Response document should be in the form of one (1) digital document in "PDF" format properly recorded on its own otherwise blank, standard CD-R recordable disc or USB flash drive and should be clearly identified as the:

**"RFP # 30901-44320 TECHNICAL RESPONSE ORIGINAL"**

and six (6) digital copies of the Technical Response each in the form of one (1) digital document in "PDF" format properly recorded on its own otherwise blank, standard CD-R recordable disc or USB flash drive clearly labeled:

**"RFP # 30901-44320 TECHNICAL RESPONSE COPY"**

The sealed customer references should be delivered by each reference in accordance with RFP Attachment 6.2, Section B.17 the only paper documents included in the document.

**3.2.2.1.2. Cost Proposal:**

The Cost Proposal should be in the form of one (1) digital document in "PDF" or "XLS" format properly recorded on a separate, otherwise blank, standard CD-R recordable disc or USB flash drive clearly labeled:

**"RFP # 30901-44320 COST PROPOSAL"**

An electronic or facsimile signature, as applicable, on the Cost Proposal is acceptable.

**3.2.2.2. E-Mail Submission**

**3.2.2.2.1 Technical Response**

The Technical Response document should be in the form of one (1) digital document in "PDF" format or other easily accessible digital format attached to an e-mail to the Solicitation Coordinator. properly recorded on its own otherwise blank, standard CD-

~~R recordable disc or USB flash drive clearly labeled~~ Both the subject and file name should both be clearly identified as follows:

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and six (6) digital copies of the Technical Response each in the form of one (1) digital document in “PDF” format properly recorded on its own otherwise blank, standard CD-R recordable disc or USB flash drive clearly labeled:

**“RFP # 30901-44320 TECHNICAL RESPONSE COPY”**

The ~~sealed~~ customer references should be delivered by each reference in accordance with RFP Attachment 6.2, Section B.17 ~~the only paper documents included in the document.~~

3.2.2.2.2. Cost Proposal:

The Cost Proposal should be in the form of one (1) digital document in “PDF” or “XLS” format ~~or other easily accessible digital format attached to an e-mail to the Solicitation Coordinator.~~ properly recorded on a separate, otherwise blank, standard CD-R recordable disc or USB flash drive clearly labeled Both the subject and file name should both be clearly identified as follows:

**“RFP # 30901-44320 COST PROPOSAL”**

An electronic or facsimile signature, as applicable, on the Cost Proposal is acceptable.

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5. Delete RFP section 3.2.3. in its entirety and insert the following in its place (any sentence or paragraph containing revised or new text is highlighted):

3.2.3. For e-mail submissions, the Technical Response and Cost Proposal documents must be dispatched to the Solicitation Coordinator in separate e-mail messages. For digital media submissions, a Respondent must separate, seal, package, and label the documents and copies for delivery as follows:

6. Delete RFP Attachment 6.2 – Section B Item B.17. in its entirety and insert the following in its place (any sentence or paragraph containing revised or new text is highlighted):

- B.17.** Provide customer references from individuals who are not current or former State employees for projects similar to the goods or services sought under this RFP and which represent:
- + two (2) accounts Respondent currently services that are similar in size to the State; and
  - + three (3) completed projects.

References from at least three (3) different individuals are required to satisfy the requirements above, e.g., an individual may provide a reference about a completed project and another reference about a currently serviced account. The standard reference questionnaire, which must be used and completed, is provided at RFP Attachment 6.4. References that are not completed as required may be deemed non-responsive and may not be considered.

The Respondent will be solely responsible for obtaining fully completed reference questionnaires and ensuring they are e-mailed to the solicitation coordinator or including them in the sealed Technical Response. In order to obtain and submit the completed reference questionnaires following one of the two processes below.

**Written:**

- (a) Add the Respondent's name to the standard reference questionnaire at RFP Attachment 6.4. and make a copy for each reference.
- (b) Send a reference questionnaire and new, standard #10 envelope to each reference.
- (c) Instruct the reference to:
  - (i) complete the reference questionnaire;
  - (ii) sign and date the completed reference questionnaire;
  - (iii) seal the completed, signed, and dated reference questionnaire within the envelope provided;
  - (iv) sign his or her name in ink across the sealed portion of the envelope; and
  - (v) return the sealed envelope directly to the Respondent (the Respondent may wish to give each reference a deadline, such that the Respondent will be able to collect all required references in time to include them within the sealed Technical Response).
- (d) Do NOT open the sealed references upon receipt.
- (e) Enclose all sealed reference envelopes within a larger, labeled envelope for inclusion in the Technical Response as required.

**E-mail:**

- (a) Add the Respondent's name to the standard reference questionnaire at RFP Attachment 6.4. and make a copy for each reference.
- (b) E-mail the reference with a copy of the standard reference questionnaire.
- (c) Instruct the reference to:
  - (i) complete the reference questionnaire;
  - (ii) sign and date the completed reference questionnaire;
  - (iii) E-mail the reference directly to the Solicitation Coordinator by the RFQ Technical Response Deadline with the Subject line of the e-mail as "[Respondent Name] Reference for RFP 30901-44320."

**NOTES:**

- + The State will not accept late references or references submitted by any means other than the two which are described above, and each reference questionnaire submitted must be completed as required.
- + The State will not review more than the number of required references indicated above.
- + While the State will base its reference check on the contents of the reference e-mails or sealed reference envelopes included in the Technical Response package, the State reserves the right to confirm and clarify information detailed in the completed reference questionnaires, and may consider clarification responses in the evaluation of references.
- + The State is under no obligation to clarify any reference information.

- 7. Delete RFP Attachment 6.4 – RFP 30901-44320 REFERENCE QUESTIONNAIRE – Instruction section. in its entirety and insert the following in its place (any sentence or paragraph containing revised or new text is highlighted):**

The "reference subject" specified above, intends to submit a response to the State of Tennessee in response to the Request for Proposals (RFP) indicated. As a part of such response, the reference subject must include a number of completed and sealed reference questionnaires (using this form).

Each individual responding to this reference questionnaire is asked to follow these instructions:

- complete this questionnaire (either using the form provided or an exact duplicate of this document);
- sign and date the completed questionnaire; and follow either process outlined below:

**Physical**

- seal the completed, signed, and dated questionnaire in a new standard #10 envelope;
- sign in ink across the sealed portion of the envelope; and
- return the sealed envelope containing the completed questionnaire directly to the reference subject.

**E-Mail**

- email the completed Questionnaire to SOLICITATION COORDINATOR NAME AND E-MAIL ADDRESS

8. **RFP Amendment Effective Date.** The revisions set forth herein shall be effective upon release. All other terms and conditions of this RFP not expressly amended herein shall remain in full force and effect.